

Draft

S. Format and Content of Proposals

Offeror must submit (1) a business proposal and (2) a technical proposal that demonstrate its understanding of Berkeley Lab requirements. In additions, offerors that are determined to be in the competitive range maybe required to participate in an interview following a review of technical proposal at Berkeley Lab.

Proposals are to be submitted on the Proposal Response Form provided. **Original and four (4) copies** of the proposal are to be provided. Offerors deviating from the format described below may be disqualified at the discretion of the University. The individual responses must restate the University requirement to which the response is being made. Discussion of each item must be fully contained within the response and must describe how the requirement will be met. The response to each item must be self-contained, concise, and clear while giving enough detail to be complete. A response similar to “will comply” will not be considered responsive.

1. VOLUME I - BUSINESS PROPOSAL

Business proposal must complete the Proposal Form to address or contain the following to be considered responsive:

1. Complete and return with your Proposal the attached forms:
 - 1.1 Proposal Response Form
 - 1.2 Representation and Certifications (RL-2358 REP)
 - 1.3 Provide price for crating and shipping on the Proposal Form
 - 1.4 Provide prompt payment discount
 - 1.5 Offeror’s Representative(s): Indicate by name and title the individuals responsible for contractual negotiations and the administration of any subcontract resulting from this RFP. These should include sales, technical, and contracts people.

2. VOLUME II – SCHEDULE AND TECHNICAL PROPOSAL

Technical proposal must address or contain the following to be considered responsive:

A. Delivery Schedule

1. Delivery schedule as specified in the Response Form. **Proposal shall be considered non-responsive** if unable to comply with the required delivery dates:
 - a. Provide delivery date and transportation terms as indicated in the Response Form.
 - b. All items to be delivered FOB: Destination as shown in the Response Form.
2. Milestone Schedule of fabrication, crating, shipping, and arrival at CERN, Switzerland

B. Qualifications: Experience and Past Performance

1. Offeror shall present prior experience in successfully fabricating items of equipment to meet comparable specifications, including quantity and delivery schedule. List all such projects in the last five years in the flowing format.
 - 1.1.1 Project Description-describe the fabrication including materials and components used.
 - 1.1.2 Dollar Value
 - 1.1.3 Project dates
 - 1.1.4 Clients and Points of contact who may be contacted as references, including name, address, and telephone number. Reference information must be up to date and verified.
 - 1.1.5 Performance records as regards to delivery within schedule and quality of work;
 - 1.1.6 Total number of years offeror has been in business supplying similar fabrications
 - 1.1.7 Type of Work In-House vs. Subcontracted. If Subcontracted, identify company and expertise/discipline and include company's experience and qualifications

C. Production Facilities and Planning

- 1 Offeror shall describe the proposed plant facilities, production facilities, and equipment that will be used to perform significant machining or processing task on the deliverables.
- 2 Offeror shall propose a detailed production timeline for fabrication and delivery of the required Cryogenic Distribution Boxes as stated in the .
- 3 Offeror shall list their major present or expected future projects, their scheduled fabrication start and completion dates and the size of the project in terms of dollar value and facility/production capacity requirements.
- 4 Offeror shall describe facility/production capacity and address present or future potential scheduling conflicts.
- 5 Offeror shall identify critical process and plans to manage this process.
- 6 Offeror shall describe the fabrication and assembly tasks they plan to subcontract and the names and qualification the subcontractors.
- 7 Offeror shall describe plan for storing and securing GFM materials and components.
- 8 Offeror shall list scheduling and planning software tools.

- 9 Offeror shall submit their welding, cleaning and vacuum test procedures and equipment
- 10 Offeror shall submit certification for key welding personnel planned to work on the DFBX fabrication.
- 11 Offeror shall describe the experience of key technical personnel planned to work on the DFBX fabrication.
- 12 Offeror shall list their internal change control procedures.
- 13 Offeror shall describe the degree by which they planned to conform to the site access requirements stated in Statement of Work LBNL M-993.
- 14 Offeror shall describe Information Technology (IT) capability to exchange CAD and data electronic files

D. Understanding the Requirements and Technical Approach

- 1 Offeror shall document any discrepancies, conflicts, or exceptions taken to the Berkeley Lab Statement of Work LBNL M-993 or any solicitation clauses as follows:
 - i. Explanation of any discrepancies,
 - ii. Explanation of any conflicts,
 - iii. Explanation of any exceptions taken, and
 - iv. Explanation of and supported advocacy rationale for any changes proposed to resolve discrepancies, conflicts, and/or exceptions..
- 2 Offeror shall describe the manufacturing and assembly plan and their approach for meeting the technical requirements listed in the Berkeley Lab Statement of Work LBNL M-993
- 3 Offeror shall specify welding process to comply with the Berkeley Lab Acceptance Specification LBNL M-989.
- 4 Offeror shall specify inspection/test process to comply with the Berkeley Lab Acceptance Specification LBNL M-989

E. Project Management , Quality Assurance and Quality Control Implementation

- 1 Quality Assurance Plan which shall detail quality assurance procedures to be applied to the overall project that demonstrate the offeror's capability to effectively manage the project, ensure all requirements of the specification are met, and produce a quality product.

- 2 Offeror shall describe the experience of key management personnel planned to work on the DFBX fabrication.

II. SELECTION CRITERIA AND AWARD

1. Evaluation Criteria

The LHC-DFBX Fabrication and Assembly are being acquired on a competitive basis. Each Proposal will be evaluated by Berkeley Lab's evaluation team based on information supplied in response to this RFP. Non-Berkeley Lab technical advisors may be utilized on the evaluation team to assist in the evaluation offers. Offeror must not expect the evaluators to be aware of the Offeror's expertise, prior experience, or other information that is not supplied with the response to the RFP. Only those proposals, which clearly demonstrate that the criteria are met, shall be evaluated. Offerors whose proposals do not meet the criteria shall be advised of that determination.

The evaluation factors are presented in descending order of importance. The first factor is the more important than the second factor. Each of the evaluation criteria are shown below:

A. Price

B. Schedule

The Berkeley Lab will evaluate the offeror's schedule. Proposes delivery schedule that exceed the RFP schedule requirements will be considered more favorable.

C. Technical Evaluation Factors:

The Berkeley Lab will conduct an evaluation of the technical proposals submitted based on the factors listed below:

Factor 1 – Production Facilities and Planning - Based on the offeror's Technical Proposal, Berkeley Lab will evaluate the extent and availability of offeror's demonstrated ability in the following areas:

(1) Machining, Assembly and Test Facilities. It is critical that production facilities and assurance that the production capabilities, equipment and milestone planning are sufficient to accomplish this project and to meet the delivery schedule. LBNL will also assess the merit and realism of the offeror's proposed production and delivery schedule and plans.

(2) Welding, Cleaning and Vacuum Test Procedures and Equipment. Procedures and equipment will be evaluated to insure that fabrication, assembly and tests are performed in accordance to the Statement of Work. LBNL M-993.

- (3) **Storing and Handling of GFM.** It is critical that the GFM be store, tracked and handled to insure its integrity in accordance to the to the Statement of Work. LBNL M-993

Factor 2 – Conformance with Specification and Understanding the

Requirement – Berkeley Lab will evaluate the Technical Proposal, in particular, the following items shall be evaluated:

- (1) **Technical Specification.** Offerors understanding of the requirements, including conformance to the specifications and schedule, based on Offeror's Technical Proposal.
- (2) **Fabrication and Assembly Plan.** Offeror's fabrication, and assembly plan to meet the requirements listed in the RFP Statement of Work LBNL M-993 and the delivery schedule based on Offeror's Technical Proposal.
- (3) **Test and Inspection Plan.** Offeror's test and inspection plan that conform to the acceptance criteria listed Acceptance Specification LBNL M-989.

Factor 3 – Qualifications: Experience and Past Performance - Offeror's demonstrated current and previous corporate, key management and technical personnel experience and certifications, past performance and qualifications directly related to satisfactory performance of contracts for fabricating similar equipment.

- (1) **Past Experience.** Berkeley Lab will evaluate the offeror's experience on the basis of its breadth, its depth, and its relevance to the work that will be required under the prospective subcontract. Berkeley Lab will consider the extent to which the offeror's key personnel have worked together in the past. Also the organizational experience of the offeror's proposed key subcontractors will be evaluated.
- (2) **Past Performance.** Past performance is a measure of the degree to which an offeror satisfied its customers in the past and complied with Federal, state, and local regulations. Berkeley Lab will contact some of the offeror's customers to ask whether or not they believe: (1) that the offeror was capable, efficient, and effective; (2) that the offeror's performance conformed to the terms and conditions of its contract; (3) that the offeror was reasonable and cooperative during performance; and (4) that the offeror was committed to customer satisfaction. In evaluating past performance, Berkeley Lab may also contact other sources of information including, but not limited to: Federal, state, and local government agencies, better business bureaus, published media, and electronic data bases. Berkeley Lab will only evaluate the offeror's organizational past performance if that performance is considered relevant to this effort. Berkeley Lab may also evaluate the organizational past performance of the offeror's proposed key subcontractors.

Relevancy for the purposes of evaluating the factors in paragraphs (1) and (2) above shall generally be defined as experience and past performance in the areas listed below:

- i. Experience and past performance in the fabrication of similar products of comparable specifications and in comparable quantities to the requirements of this subcontract during the past five years.
- ii. The relevant experience, qualifications and past performance of key management and technical personnel assigned to perform the required work.

Factor 4 – Quality Assurance and Quality Control Implementation - Berkeley Lab will evaluate the offerors Quality Assurance plans and procedures to be applied to the overall project and their ability to effectively manage the project, ensure all requirements of the specification are met, and produce a quality product

Factor 5 – Site Access – Berkeley Lab will evaluate proximity of offeror's production facility, the site access plan offered to Berkeley Lab or its representative to witness production process and inspection tests.

The Berkeley Lab evaluators will review each proposal to determine whether the **Requirements** are met. If, in Berkeley Lab's sole judgment, it is determined that a Requirement is not met, or the response does not fall within the allowance provided for in **Section S, the proposal may be rejected**. Proposed firm fixed price will be evaluated from the lowest to the highest and how the differences relate to the impact of the benefits defined in the Scope of Work.

The Berkeley Lab evaluators may hold discussions with offerors selected in the competitive range regarding clarifications relating to their proposal.

2. Selection process: Basis for Award

Award will be made to that Offeror whose proposal contains the combination of those factors offering the best overall value to the University. This will be determined by comparing differences in the value of proposed technical and management features with differences in cost to the laboratory. In making this comparison, the University is primarily concerned with making an award at the lowest overall cost to the University and secondarily concerned with technical or schedule performance. However, the University will not make an award based on a proposal with significantly inferior technical or management performance features in order to achieve a small savings in overall cost to the University.

After receipt and evaluation of proposals, a competitive range of proposals will be determined. The University anticipates there may be clarification required of those in

the competitive range. If these result in adjustments in the Scope of Work, then a call for best and final offers will be issued to all Offeror in the competitive range.